

Baltimore City
Comprehensive Economic Development Strategy
(CEDS)
Evaluation Indicators - 2008

Matthew Kachura
BNIA-JFI
University of Baltimore
November 6, 2008



CEDS 2008

- National Rankings
- CEDS
 - Goals
 - Outcomes
 - 2009

Baltimore City National Rankings

- 8th Best city to ride out recession (Forbes)
- 1st – Top U.S. Ports for Roll-on/Roll-off cargo (U.S. Dept of Transportation Maritime Admin)
- 8th – U.S. passenger rail stations (Amtrak)
- 7th – Public transit cities (CNN Money)
- 8th- Top U.S. downtown populations (DPOB)
- 7th- Top arts destinations (American Style)
- 3rd – Top 10 harbors (Coastal Living)

CEDS Goals

- Improve rapid and reliable transit
- Promote, enhance, and expand cultural and entertainment and nightlife opportunities
- Prepare and retain all youth and adults for the job market
- Improve ability to match needs of employers with a skilled job candidate pool
- Enhance public and technology infrastructure
- Increase the City's residential and commercial tax base

Transit

Percentage of Workers Who Use Public Transportation

| | |
|------|--------|
| 2002 | 24.74% |
| 2003 | 18.20% |
| 2004 | 20.51% |
| 2005 | 18.93% |
| 2006 | 19.55% |
| 2007 | 19.37% |

Source: U.S Census Bureau

Transit

MTA Annual Ridership (Thousands of Riders)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|-------------|--------|--------|--------|--------|--------|--------|--------|
| Total Users | 92,261 | 92,915 | 92,915 | 82,037 | 80,979 | 81,846 | 84,618 |
| Bus | 70,145 | 70,127 | 66,736 | 63,793 | 63,241 | 63,526 | 64,272 |
| Metro | 13,597 | 14,240 | 13,196 | 12,426 | 12,863 | 12,919 | 13,225 |
| Light Rail | 8,519 | 8,548 | 7,387 | 5,818 | 4,875 | 5,401 | 7,121 |

Source: Maryland MTA

MARC Annual Ridership (Thousands of Riders)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|-------------|-------|-------|-------|-------|-------|-------|-------|
| Total Users | 5,735 | 6,063 | 6,336 | 6,727 | 6,884 | 7,275 | 7,505 |

Source: Maryland MTA

Cultural, Entertainment & Nightlife

| Leisure and Hospitality | | | |
|--------------------------------|---------------------------------|--|--------------------------------------|
| | Average Annual Employment | Average Annual Number of Businesses | Average Employees per Business |
| 2001 | 26,381 | 1,537 | 17 |
| 2002 | 27,364 | 1,637 | 17 |
| 2003 | 27,058 | 1,667 | 16 |
| 2004 | 26,269 | 1,669 | 16 |
| 2005 | 26,563 | 1,689 | 16 |
| 2006 | 25,983 | 1,735 | 15 |
| 2007 | 26,315 | 1,809 | 15 |

Source: Maryland DLLR

Cultural, Entertainment, & Nightlife

Part 1 Crime Rates per 1,000

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | Change 2006-2007 |
|---------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------------------|
| Greater Charles Village/Station North | 146.06 | 118.24 | 107.46 | 86.93 | 110.20 | 67.98 | 83.61 | 70.61 | (13.00) |
| Jonestown/Oldtown | 163.15 | 164.08 | 161.51 | 145.37 | 110.41 | 93.86 | 101.26 | 92.53 | (8.73) |
| Fells Point | 191.15 | 165.36 | 158.48 | 136.31 | 118.22 | 95.23 | 97.91 | 96.28 | (1.63) |
| Clifton-Berea | 94.51 | 86.35 | 77.22 | 62.02 | 52.34 | 46.17 | 49.30 | 49.06 | (0.24) |
| Midtown/ Mt. Vernon | 228.03 | 183.62 | 144.65 | 130.71 | 123.30 | 107.39 | 106.64 | 119.08 | 12.44 |
| Inner Harbor/Federal Hill | 200.42 | 187.05 | 172.13 | 138.54 | 122.80 | 114.97 | 105.19 | 122.23 | 17.04 |
| Canton | 141.94 | 117.40 | 88.30 | 106.56 | 80.46 | 63.05 | 71.18 | 89.16 | 17.98 |

Source : Baltimore City Police Department

Violent Crime Rates per 1,000

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | Change 2006-2007 |
|---------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------|
| Greater Charles Village/Station North | 29.62 | 24.90 | 26.35 | 21.46 | 19.71 | 15.51 | 17.72 | 16.09 | (1.63) |
| Fells Point | 35.48 | 37.34 | 33.03 | 25.79 | 18.79 | 18.44 | 19.61 | 19.25 | (0.36) |
| Inner Harbor/Federal Hill | 23.97 | 18.84 | 17.86 | 15.74 | 13.05 | 13.21 | 14.27 | 14.51 | 0.24 |
| Jonestown/Oldtown | 39.37 | 39.07 | 29.40 | 34.03 | 25.60 | 19.22 | 22.82 | 24.16 | 1.34 |
| Canton | 22.11 | 16.12 | 13.12 | 13.69 | 12.98 | 11.13 | 9.13 | 11.98 | 2.85 |
| Clifton-Berea | 38.25 | 36.33 | 28.33 | 24.81 | 20.01 | 18.97 | 18.17 | 22.49 | 4.32 |
| Midtown/ Mt. Vernon | 32.71 | 25.91 | 27.34 | 22.99 | 18.36 | 16.80 | 18.36 | 24.01 | 5.65 |

Source : Baltimore City Police Department

Prepare & Retain Youth and Adults for the Job Market

- High School Completion Rate
 - 82% for 2005-2006
- Dropout Rate
 - 7.9% for 2008
- Holding Power
 - 46% for 2007

Prepare & Retain Youth and Adults for the Job Market

Educational Attainment for Total Population

| | 2005 | 2006 | 2007 |
|------------------------------|--------|--------|--------|
| High School Degree or Higher | 75.50% | 74.20% | 75.40% |
| Bachelor's Degree or Higher | 23.40% | 23.30% | 24.10% |

Source: U.S. Census Bureau

Skilled Job Candidate Pool

■ High School Students

Percent of Population 16-19 That Is Employed

| | |
|------|--------|
| 2003 | 19.77% |
| 2004 | 24.11% |
| 2005 | 25.94% |
| 2006 | 23.63% |
| 2007 | 24.10% |

Source: U.S Census Bureau

■ College Enrollment

Higher Education Enrollment

| | 2005 | 2006 |
|--------------------|--------|--------|
| College Enrollment | 40,721 | 52,904 |
| Age: | | |
| 18-19 | 46.80% | 62.70% |
| 20-24 | 28.90% | 37.40% |
| 25-34 | 20.30% | 18.70% |
| 35+ | 4.10% | 4.00% |

Source: U.S Census Bureau

Skilled Job Candidate Pool

Change from 2006 to 2007

| Sector | Employment | Number of Firms |
|--------------------------------------|------------|--------------------|
| Professional and Business Services | - | + |
| Leisure and Hospitality | + | + |
| Education and Health Services | + | + |
| Trade, Transportation, and Utilities | - | - |
| Information | - | + |
| Construction | - | + |
| Financial Activities | - | + |
| Other Services | - | - |

Public & Technology Infrastructure

- Conduit Users
 - 44 (as of 2008)
- Free Wireless Hotspots
 - 34 (concentrated in Downtown and Midtown)

Residential & Commercial Tax Base

Projected City Funding Sources (Millions of Dollars)

| | Property Taxes | Income Taxes | Other Local Taxes |
|------|-----------------|-----------------|-------------------|
| 2008 | \$623.5 (23.6%) | \$236.7 (9.0%) | \$210.9 (8.0%) |
| 2009 | \$681.3 (31.0%) | \$261.1 (11.9%) | \$188.6 (8.6%) |

Source: Baltimore City Government

Baltimore City Mortgage Foreclosure Filings

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | % Change 2006-2007 |
|----------------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------------|
| Baltimore City | 5,255 | 5,597 | 5,123 | 4,446 | 4,032 | 3,145 | 3,197 | 3,990 | 22.51% |

CEDS 2009

- Update to indicators
- Addition of indicators
 - Public and technology infrastructure
 - Other



Matthew Kachura
BNIA-JFI
University of Baltimore

mkachura@ubalt.edu

410-837-6651